

bookers. Continual communications with the travel trade is crucial in keeping your message and product in the forefront.

The greatest impetus for a recovery year lies in the currency exchange. Currently, the EURO is at an all time high, and the GBP continues to hover around the \$1.80 rate. As long as these currencies remain strong, the British and continental Europeans will perceive the United States to be a great value. This, coupled with a three year pent up demand for long haul travel, provides the best environment for such a recovery. Travelers will either "trade up" from their usual accommodations standard booked, or have more discretionary money to spend on attractions, entertainment, dining, etc., while visiting the destination.

The Keys are considered an "upscale market" destination within the international travel trade community, and are not geared towards the budget traveler or mass market. The authenticity of our natural environment, the culture influences associated with our Latin and Bahamian settlers and the beauty of the Overseas Highway Scenic Drive all combine to make for a memorable visit by even the most experienced international traveler.

## **Profiles**

Resources used in the information provided below includes Visit Florida Research Department, the Travel Industry Association of America, the U.S. Consulate Service, Visit USA Committees and the U.S Embassy

### **I. EUROPE**

#### **BELGIUM**

##### **International Traveler Profile**

- U.S. is the top long-haul destination
- California, New York and Florida are the favored areas to visit
- Average length of stay is 13 nights, and a majority choose fly/drive holidays
- Average age is 19-40
- Belgians seek a sun vacation each summer
- Belgian travelers are independent, seeking tailor-made trips.

##### **Travel Preferences and Trends:**

- The potential Belgian traveler will research about a possible destination in the US before making their travel plans.
- Belgian incomes allow for a high level of disposable income to be spent on long-haul travel
- Seeking more "Adventure Vacations" vs. strictly beach activity

##### **Economic Considerations and Political Trends:**

- Belgium economy very strong, and is one of the most profitable countries in Europe.
- Travel and tourism from Belgium is expected to recover fully and surpass pre 9/11 numbers in 2005.
- Belgium is the Capital of the European Union

## **FRANCE**

### **International Traveler Profile:**

- US remains top choice among long haul destinations
- 70% of visitors choose fly/drive vacations, as they are individualized
- 90% of visitors are adults, but families with one or two children have increased
- 55% of visitors come from Paris and its surrounding regions
- Average age is 25-45 years old
- Average length of stay is 15 days for fly/drive market
- Vacations usually taken between June 30 and September 15
- Trend is toward more "natural destinations and exploration vs. Theme parks
- The French are attracted to the sea, beaches, sun which explains Florida's popularity
- The French are also very fond of culture and history and food
- New York, Florida, and California remain the preferred destinations
- The French customer is generally a repeat visitor

### **Travel Preferences & Trends:**

- Daily, direct air service into Miami and Orlando increases exposure of FI Keys to the French market.
- Today's generation of travelers is comfortable traveling in English-speaking areas
- The French customer is a repeat visitor, who, having experienced the most popular destinations, is now looking for new activities and destinations.

### **Economic Considerations and Political Trends:**

- Market indicators project continued growth in the French market. The US is expected to continue its designation as first choice in long haul travel
- An increase in strength of EURO coupled with low airfares will encourage the French to travel abroad
- Tour operators are now selling directly to the consumer, thereby passing on the savings and omitting the retail agent

## **GERMANY, AUSTRIA AND SWITZERLAND**

### **International Traveler Profile:**

- Florida remains the #1 U.S. based destination for German market travelers
- Average length of stay is 2 weeks
- Main travelers to Florida are now adults w/o children (93% vs. families 6.8%)
- Strong EURO vs. USD may stimulate family business to return
- Shoulder seasons may see increase in visitors due to profile shift from families to couples
- Reasons for traveling: weather, climate, beaches, nature, wildlife
- Top Interest for the Florida Keys: dolphin interaction; Hemingway; snorkel/scuba diving

#### Travel Preferences and Trends:

- Tendency to book last minute long haul travel continues (1-3 months)
- Internet bookings not effecting tour operator business. Represent less than 9% of all travel business.
- Most tour operators report an increase in fly/drive bookings and FIT bookings
- Greatest growth potential is in "young, active senior" market (over 50) or adults without children

#### Economic Considerations and Political Trends:

- Long haul bookings stimulated by favorable exchange rate 1.20 EURO /1 USD and value adds in trade brochures stimulating demand
- Second print run of summer '04 brochures with re-calculated, favorable pricing stimulates demand
- The Florida Keys "natural and relaxed" atmosphere appealing to the German speaking market.

### **IRELAND**

#### International Traveler Profile:

- The U.S. is the most popular long-haul holiday destination
- Ireland represents one of the fastest-growing markets for U.S. based travel and tourism products
- Florida, New York and California most popular destinations
- The United States earns one half of Ireland's long haul travel market
- Traveler relies heavily on printed guidebooks, travel professionals advice on destinations
- Many Irish visitors will be visiting Friends and Relatives, especially on the East Coast

#### Travel Preferences and Trends:

- Prefers sunny, warm destinations
- Destinations "slightly off the beaten path" becoming very popular
- Increased lift from Shannon and Dublin airports may encourage more travel to the States
- Historically, the US is a very traditional market for the Irish
- Average length of stay is 16.9 nights in the U.S.
- Irish visitors (vs. EU counterparts) are more likely to include children on their trip

#### Economic Considerations:

- Ireland has the fastest growing economy in the European Union
- Industry experts anticipate Irish passenger travel to reach year 2000 levels in 2005
- Since long-haul travel is quite new to most Irish passengers, the tour operators and travel trade play a key role in recommending our destination to their clients
- U.S. represents good value to the Irish traveler as the EURO gains strength

## ITALY

### International Traveler Profile:

- U.S. remains as the top long-haul preferred destination
- New York, California and Florida remain the most preferred destinations within U.S.
- Expenditures by Italian tourists in the U.S. is one of the highest from European countries
- U.S. is perceived as "easy to visit" thus more frequent, shorter trips are becoming the norm
- Average length of stay is 8 nights for Florida market
- Prefers destinations that offer history, culture and nature
- 87% of Italian tourists are FITs, preferring fly/drive custom tailored vacations
- Peak season for Italian travel: July through mid-September, with over 45% of long-haul travel occurring in August

### Travel Preferences & Trends:

- Cultural, historical and ecological attractions/activities are preferred when visiting a destination
- Fly/drive packages are the most popular, with customer choosing the itinerary and the tour operator provides the estimated cost on an individual basis
- Non stop lift from Rome and Milan into Miami positively exposes the Florida Keys to the Italian traveler
- Italian tourists tend to make their travel arrangements late (54% of packages were sold between 15 and 30 days before departure).

### Economic Considerations:

- Consolidation in the local travel industry, coupled with larger tour operators with substantial buying power will make travel to the US more affordable and positively impact travel
- The Florida Keys attracts the sophisticated, upscale Italian tourist. This market segment not adversely effected by general economic climate.
- Italian tour operator catalogues have a shelf life of only 3 months, compared to the 6 month shelf life for their British and German competitors.
- The number of travel agencies in Italy has increased by over 40% in the past 5 years.

## THE NETHERLANDS

### International Traveler Profile:

- The U.S. is the favored long-haul destination
- California, Florida and New York are the top three visited destinations
- Florida is the most popular among first time visitors
- Miami is the second largest port of entry into the US for the Dutch
- Prefers fly/drive vacations
- The Dutch traveler is usually a young couple with out children or active senior market
- Tend to be repeat visitors, come from high income group and speak excellent English

#### **Travel Preferences & Trends:**

- The Netherlands is one of the ten fastest growing international travel markets.
- Dutch travelers seeking "new" experiences, i.e. diving, dolphin encounters, etc.
- Florida destinations must maintain its competitive edge to attract repeat visits
- Prefer mid priced hotels vs. luxury accommodations
- The "active senior" segment is the fastest growing travel sector coming out of the Netherlands

#### **Economic Considerations and Political Trends:**

- Positive economic developments may stimulate travel
- Strong EURO currency will positively influence travel
- The U.S. is expected to remain top long haul destination due to marketing efforts
- Increased lift into Florida will positively stimulate Keys exposure to Dutch visitors

### **NORWAY**

#### **International Traveler Profile:**

- Average age is 35 years old
- Most are family oriented, with 1 or 2 children accompanying adults
- Average length of stay is 14 nights
- Prefer hotels, inns and bed and breakfasts
- Prefer customized fly/drive packages
- Will research destinations on-line, but consult travel trade for actual booking

#### **Travel Preferences and Trends:**

- The U.S. continues to be the preferred long-haul destination
- Norwegians prefer "sun and coastal" destinations to escape harsh climate
- Interested in "action and adventure" travel (scuba diving, deep-sea fishing)
- Over 63% of all travel to the US is organized through specialist travel agents, which will tailor the vacation to the specific requirements of the traveler
- Most travel occurs during the summer months (mid-June-September) with a peak in July

#### **Economic Considerations and Political Trends:**

- Norway has healthy economic outlook with low unemployment and positive growth
- The introduction of a fifth vacation week may stimulate long-haul travel in shoulder mos.
- Major connecting hubs from Norway to the U.S. are London, Frankfurt and Paris

## **SPAIN**

### **International Traveler Profile:**

- The United States is most favored long-haul destination
- New York, Florida and California are the top visited markets, with Arizona/Nevada and the National Parks coming on strong
- Average length of stay averages 7-9 days
- Average age of long haul traveler is 25-45 years

### **Travel Preferences and Trends**

- Visitors from Spain usually come during August, when most businesses close for summer vacation
- 62% travel with families, 32% as couples
- Spanish travelers are late planners. At most, travel agents are contacted 30 days prior to departure. Tour operators publish summer catalogues no sooner than late April
- 50% of Spanish travelers are repeat visitors and belong to the upper middle class

### **Economic Considerations and Political Trends:**

- Spain is a member of the Visa Waiver Program
- Member of the European Union, therefore EURO currency makes long haul to the U.S. very favorable
- Daily, non-stop service from Miami to Madrid on several carriers make travel to Florida convenient and economical

## **SWEDEN**

### **International Traveler Profile:**

- The United States is second most favored long-haul destination
- Top three visited states are: California, New York and Florida
- Average Length of stay is 14 days
- Prefer destinations offering sun and beaches
- Prefer budget and mid price accommodations

### **Travel Preferences and Trends:**

- Eco tourism and soft-adventure trips on the rise
- Most travel is conducted June-September
- Average annual growth in number of Swedes visiting U.S. is 8% per year
- Prefer fly/drive packages with "add on" opportunities
- More and more Swedes are traveling to the Keys without a pre-paid reservation

**Economic Considerations and Political Trends:**

- Swedish economy is strong; Krona to dollar is strengthening
- Greatest growth potential is in holiday fly/drive tours
- Tour operator market is highly competitive; service and value is key

**UNITED KINGDOM**

**International Traveler Profile:**

- Florida captures 37% of the market share for all UK visitors to the US
- Top three visited states were Florida, New York, California
- Florida profile is one of young families on fly/drive holidays. Since 9/11 the couples market stayed strong while the family market has been very slow
- Stays for 10 nights
- Families will stay in hotels, private and/or rented homes. Couples will stay in small inns, bed and breakfast type accommodations
- Sun and beach trips continue to be the most favored holiday, but the seasoned traveler is seeking more action and adventure

**Travel Preferences & Trends:**

- Up to 75% will use a travel agent
- 54% will use a tour operator
- 26% will book via the internet
- Variety of products and services, familiar lifestyle and language are all important booking factors
- Current booking trend is still a late booking market, although some tour operators are now beginning to take some future bookings for busy periods
- The UK traveler is very resilient and will continue to travel long haul despite world wide security and SARS virus influences
- The UK traveler continues to search for new areas to visit. Niche markets continue to grow which gives some new opportunities for the Keys (i.e. diving, sailing, gay market, weddings and honeymoons )

**Economic Considerations and Political Trends:**

- The UK has been fortunate in that the worldwide economic slowdown has hit the UK economy less severely than most other countries
- Competition from other long haul destinations has been diminished due to the SARS epidemic in Asia and security concerns in North Africa and the South Pacific.

## **II. ASIA**

### **JAPAN**

#### **International Traveler Profile:**

- The US. continues to be the most popular long haul destination
- The top three visited states were Hawaii, California, New York
- The states with the greatest potential for an increase in arrivals is Nevada, California, Florida
- Hawaii will remain at top place
- The active senior traveler is the fastest growing market segment in the Japanese tourism sector
- Visits mainland for approximately 8 days
- Stays in hotels and condominiums
- Prefers shopping, natural and scenic attractions, "observational tourism"
- Amongst packaged and group travelers, 53% used full package tours involving tour guides and local guides
- Mainland U.S. visitors are young, with over half under the age of 35, and with very high household incomes (equivalent to \$100,000 USD or more)

#### **Travel Preferences and Trends:**

- Japanese prefer to travel in groups
- Peaks in travel to FL are Sept/October and Feb/March
- Access to Baseball Park/Stadiums popular
- One in five Japanese visitors use a tour operator for destination information
- Travel agencies remain the most widely used source for travel information

#### **Economic Considerations and Political Trends:**

- Market has been in a decline since 1997, however TIA estimates an increase in arrivals for 2004/2005
- Uncertain economy looking for value or packaged tours
- Yen is appreciating against the USD, making a trip to the U.S. good value



### **III. NORTH AMERICA**

#### **CANADA**

##### **International Traveler Profile:**

- Florida remains the #1 destination of choice
- Average age is 45-64 years old
- Prefer sun and beach destinations
- Average length of stay is 17 nights

##### **Travel Preferences & Trends:**

- Florida, California, and Arizona rank as top non-border state destinations
- 63% prefer to fly, 31.1% drive to their destination of choice
- Of Canadian visitors, 86% came from Ontario and or Quebec provinces
- 70.4% traveled without children
- 43% traveled between January and March
- 29.7% stay in hotel/18.1% stay in combination of hotel/condo/villa during their visit
- The Canadian traveler seeks "value for price paid" when selecting accommodations

##### **Economic Considerations:**

- The Canadian dollar has gained strength in relation to the US Dollar, and with hotels offering more incentives and value adds, this may stimulate an increase in Canadian travel.
- Sun destinations like Mexico and all inclusive resorts in the Caribbean are competitive
- Canadian economy forecasted to grow solidly

### **IV. SOUTH AMERICA**

#### **ARGENTINA**

##### **International Traveler Profile:**

- 47% traveled on holiday/ 48% on business
- Top 3 states visited are Florida, NY and California
- Average length of stay in the U.S. is 20.8 nights
- Miami is the No.1 Port of Entry to the US.
- 73% prefer hotels, motels
- 94% are repeat visitors to the U.S.

##### **Travel Preferences and Trends:**

- Enjoy shopping, dining out, sightseeing, visiting historical sites
- Many wealthy Argentines travel 2 or 3 times per year to the US
- Argentines tend to be well traveled and will split their travel planning evenly between packages and FIT bookings
- Rent cars for intra state travel (e.g. Miami to Orlando), but will fly between destinations (e.g. Orlando to New York)

- Annually, more Argentines visit Miami than visit Orlando, New York City, Los Angeles, and San Francisco combined

**Economic Considerations:**

- Even with the devaluation of the Argentine currency, travel to the US. is still a less expensive option than Europe
- Conclusion of the visa waiver program has created a backlog of requests for Visas. The US Consulate in Buenos Aires receives over 500 requests an hour for visas, with each Visa priced at \$100 USD.
- The top ten tour operators in Argentina generate more than 50% of long haul travel transactions

**BRAZIL**

**International Traveler Profile:**

- Top three visited States last year were Florida, New York and California
- Miami is the number one Port of Entry for Brazilian travelers
- 85% of visitors are adults only
- The majority of Brazilian visitors to Florida enjoy a household income of over \$100K annually
- Tends to combine business trip with leisure excursions
- Brazilians tend to travel to FL in July, followed by December and January

**Travel Preferences and Trends:**

- Visiting friends and family is the #1 attribute of travel to Florida
- 88% of Brazilian travelers to FL are repeat visitors
- Favorite past times are shopping, gambling and theme parks
- 52% of outbound travelers vacationed with their family
- 62% of Brazilians used a travel agent to organize outbound trips

**Economic Considerations:**

- New political administration is stabilizing the economy
- Brazilian "real" has lost its value recently, making travel to the US more expensive
- Conclusion of Visa waiver program making travel to the US more difficult

## DOMESTIC MARKET OVERVIEW

Our traditional "feeder" markets continue to be the Northeast and the Mid-west in the winter months and the Southeast (including Florida) in the shoulder and summer season. There are also regional markets that have opened up since the inauguration of the regional jet service from Hartsfield International Airport in Atlanta. Areas in Tennessee and the Carolinas are now enjoying convenient and more economical jet service from Atlanta to Key West. We will continue to promote to these geographical locations.

Information gleaned from participation in consumer shows this past season indicated that consumers were seeking a bargain when purchasing their airline tickets and were comfortable flying low cost carriers. Most of these low cost airlines (i.e. Jet Blue, Southwest, AirTran, etc.) utilize smaller, more regional airports. (i.e. Ft. Lauderdale vs. Miami International). A majority of these airline ticket purchases were completed on line. With the usage of more regional airports, consumer sentiment indicated that they would consider a twin-center holiday within the Florida Keys to help break up the drive from Ft. Lauderdale. They were also willing to take their time to enjoy the scenic drive along the Overseas Highway and visit some of the smaller attractions along the way. In addition to this trend, where the consumer was looking for a bargain in airfare and willing to take the extra time to drive to their final destination, they were willing to upgrade their choice in overnight accommodations.

As more and more consumers seek vacations that include interacting with nature or re-connecting with loved ones, the specialty markets focusing on Adventure, Honeymoon/Romance and Cultural/Historical travel will be targeted. All of these market segments prefer upscale accommodations where service and comfortable amenities are available to them.

Travel trade consortiums like AAA and Virtuoso are areas of focus in the domestic travel trade arena. AAA Auto Club South is the 3<sup>rd</sup> largest club in the United States with more than 3.5 million members in Florida, Georgia and Tennessee. *They have 70 branches, 50 of which are located in the State of Florida. The Florida Keys ranks 3<sup>rd</sup> in most requested destination information in the State of Florida!* In addition, the AAA Tour Book continues to be the leading source of information for consumers within the printed advertising segment.

Virtuoso member travel agencies are strictly geared to the upscale, discriminating traveler. Less than 1% of travel agencies in the United States qualify to be a Virtuoso member. Supplier members of Virtuoso must also meet strict guidelines and offer exceptional customer service. Virtuoso agents have long standing relationships with their clients, and their clientele base doesn't have the time, nor has the inclination of searching the Internet for the best "deal". These travelers are time impoverished and leave the details of planning a vacation to their travel professional.

Our Visitor Profile Survey reports that almost 19% of respondents said a travel agent recommended the Florida Keys and Key West as a vacation destination. The staff will look to increase our relationships with AAA and Virtuoso agents and provide them with educational opportunities so that they can act as an extension of our sales staff.

## **CORPORATE MEETINGS AND INCENTIVE MARKET OVERVIEW**

The current corporate and incentive meetings market within Monroe County has weathered the budget cuts and downsizing that have taken place in 2002 and 2003. More economic activity and rising corporate revenues indicate a positive future in the meetings industry. Fiscal responsibility and perception of how corporate dollars are spent has become a leading factor in determining where meetings are held. Cautious optimism throughout the industry exists even during an improving economy in 2004, as the underlying and continual threat of terrorism has become a factor in all business activities. In the end, all economic indicators suggest by the year 2005, the industry could see the return to substantial growth.

The corporate meeting and incentive market segments remain a vital revenue-generating component for many of the hotels and resorts throughout Monroe County. This market segment is invaluable for as a strong group base helps to drive RevPar within the hotel. In addition, group business drives food and beverage revenues in catering and restaurant outlets, attractions and shops from attendees who tend to be more upscale and affluent. An attendee of a meeting in the Florida Keys may also create a huge potential to generate future leisure business.

Shorter-term booking pace remains evident in all major domestic feeder markets; however, the industry is trending to the position where hotels have retained the power to set rates. In this regard, longer term booking requests are resuming in an effort for the planner to retain some negotiating power in room rate. Security and safety for the meeting attendee remains a major concern. The trend for companies to stay within US borders has continued to be beneficial for this destination. The ability to both fly and drive to a Caribbean-like domestic destination is appealing; however, air accessibility can be an obstacle in persuading a company to choose the Florida Keys. Increased costs for airline travel in addition to the addition of second generation air carriers who do not service this destination can also be hinder negotiations.

Geographic marketing focus continues within the traditional feeder markets, such as the Northeast, Mid-Atlantic, Midwest and the Southeast. Particular market segments that have shown to have healthy budgets include: incentive, pharmaceutical, medical education, financial and government markets. An emphasis will be on face to face sales calls in an effort to train and educate planners, empowering them to become potential sales arms by recommending this destination to their clients. Additional sales efforts will be made in secondary markets such as California, the cities of Minneapolis and St Paul, St Louis and the Research Triangle Park region in North Carolina. Atlanta remains prominent as a Southeast feeder city as many major corporations have established offices in that region in addition to the city becoming a major international and domestic gateway. As a unique destination for meetings and incentives, we will continue to seek meetings and incentive business ranging in size from 15 to 300 attendees.

There are several professional associations which we align ourselves with for assistance in several areas within the meetings and incentives market. These associations include: International Association of Conventions and Visitors Bureau (IACVB), Meeting Professionals International (MPI), Visit Florida (FLAUSA), Florida Society of Association Executives (FSAE), Tallahassee Society of Association Executives (TSAE), Association Forum of Chicagoland, and the Hospitality Sales and Marketing Association International (HSMAI).

## **GAY/LESBIAN MARKET PROFILE**

The Gay market segment continues to show consistent growth, and occupancy levels in the gay and gay friendly properties have remained high. According to the recent survey of gay and lesbian visitors to the Keys, most stayed between 3 and 7 nights with the average being 5.45. Hotels, motels, and resorts captured over 32% of the visitors.

As one of the country's top rated destinations for gay and lesbian travelers, Key West is a place to be relaxed with its all-welcome, One Human Family philosophy. It is important to maintain the momentum established both domestically and internationally.

A survey completed recently by Community Marketing, Inc., continues to project an increase in the gay and lesbian visitors to Key West. The report, conducted online, ranked Key West in the top six destinations gay and lesbian visitors plan to visit. Most respondents reported income in the \$40,000-74,000 bracket, while forty-nine percent of the gay men and twenty-five percent of the lesbians reported income in excess of \$75,000. When compared to the U.S. domestic tourism industry, the TIA reported an annual household income of \$68,800 with a median income of \$57,800.

Readers of Out and About, a leading Gay travel publication, voted Key West the top 2004 winter resort for Gays and Lesbians in North America, while the Advocate magazine ranked us the top summer resort.

With the continued conflict in Iraq, gay and lesbian consumers have not been deterred from travel. Ninety percent plan travel to destinations in the United States, 45% plan to visit Europe. Over half of those surveyed indicated they travel to a destination because it is "gay friendly", with 75% choosing a destination based on having a variety of offerings. Repeat visitors account for 64% returning to destinations previously visited.

The marketing efforts toward this segment have included trade shows for both travel professionals and consumers. Membership in the International Gay and Lesbian Travel Association offers networking and marketing opportunities, and the Gay Market Sales Manager currently serves on its board of directors and is Treasurer of the Association.

The destination is also represented at international venues including World Travel Market, Christopher Street festivals in Europe, and ITB. There has also been considerable press coverage domestically and in Europe through the efforts of Stuart Newman & Associates, McClusky and Associates, and the TDC staff. Similar promotions to this market segment will continue with expansion in the domestic gay press.

The Gay and Lesbian community has more disposable income, and has a propensity for travel and enjoys sightseeing, local culture, dining, shopping, museums, and beaches. Top motivations for selecting Key West as their vacation destination include having a variety of things to do, having been there before and liked it, having a reputation for being gay-friendly, and being safe. This makes the gay and lesbian market extremely lucrative for our destination. Based on national population figures, the American gay and lesbian community represents a US \$54.1 billion travel market.

## **FY 2004-2005 SALES ACTIVITY CALENDAR**

### **OCTOBER 2005**

#### **October 3**

##### **Rainbow Festival**

##### **Phoenix, AZ**

Registration: \$950.

Steve Smith

Brochure Distribution available at \$50.

The Rainbow Festival is held in Heritage Square Park and is the largest Gay and Lesbian event in Phoenix. This event is being held after the "Aids Walk, Arizona", which drew over 22,000 participants last year. The walk begins and ends at the site of the Travel Expo.

#### **October 7-10**

##### **Luxury Travel Expo**

##### **Manhattan, NY**

Registration: \$2,500

Jutta Farrer

Co-op participation available to 2 partners at \$500.

Building upon the enormous success of Luxury Travel Expo in Las Vegas, Advanstar Communications is bringing their Luxury Travel Expo to the Northeast this fall. This premier first time East Coast event is expected to attract up to 1,500 top-level executives and independent agents as well as high-end consumers. This showcase is geared towards educating and training travel agents that purchase luxury travel or whose clients require high-end travel products as their travel preference.

The first two days will be dedicated to members of the travel trade and the balance open to upscale travelers and affluent consumers. The agents in attendance will include those who book leisure travel, corporate/incentive travel and will be represented by various consortia agencies such as American Express Corporate Travel Services, American Express Platinum Travel Services, Carlson Wagonlit Travel and Virtuoso Agencies.

This is the perfect opportunity to showcase boutique properties or high end product to the Northeast corridor during the fall booking months.

**October 8-10**

**Salon Envie de Partie**

**Paris, France**

Registration:                \$2,500.                                Sabine Chilton

This consumer event is held every October, and is attended by all the major tour operators and their clients. The Florida Keys and Key West has been invited to attend this event in cooperation with Visit Florida to showcase our destination to high end consumers from the greater Paris region. In addition to this consumer show, the destination will be conducting presentations and educational training sessions to top tour operators surrounding the greater metropolitan area who currently feature the Keys.

**October 12-16**

**DEMA**

**Houston, TX**

Registration:                Covered by Dive Umbrella                                Susanne Tortu

The Dive Equipment and Manufacturers Association is a show specifically geared at the Dive Industry and its providers. Dive consumers are not in attendance. The show attracts attendance from all facets of the dive industry including travel agencies and tour operators specializing in dive vacations and travel.

**October 14-15**

**ITSA (International Travel Services Association)**

**Key West, FL**

Registration:                \$450.                                Stacey Mitchell

The 11<sup>th</sup> annual General Membership meeting of the ITSA organization is being held in Key West for the first time. TDC staff will attend as "ambassadors to the destination", welcoming the Buyer Members (Receptive Tour Operators) in attendance. Participation by Keys partners is strongly encouraged, as this is the perfect opportunity to meet with product managers from all of the RTO's located in Florida and showcase your product to the international inbound market.

**October 28**

**Gay and Lesbian World Travel Expos**

**San Francisco, CA**

Registration: \$1,500.

Steve Smith

Brochure Distribution available at \$50 per partner.

The Gay and Lesbian World Travel Expositions are held in six cities across the United States (Washington DC, Boston and Philadelphia) and follow a format including educational workshops and table top exhibits for trade only followed by a 5 hour consumer show.

The Florida Keys and Key West has participated in these venues for the past ten years and provide a means to network with travel professionals and consumers who travel on a regular basis.

**NOVEMBER 2005**

**November 1-5**

**Gay Travel Expos**

**Munich, Hamburg, Berlin, Koln, Frankfurt**

Registration: \$2,500.

Steve Smith

Brochure distribution available at \$100.00 per partner.

This is a week long gay road show, consisting of tabletop presentations to approximately 100 travel professionals and media in each city.

**November 7-10**

**Florida Encounter with Visit Florida**

**Orlando, FL**

Registration: \$2,000.

Susanne Tortu

Visit Florida produces this annual event to provide Florida meeting and convention suppliers an opportunity to reach qualified corporate, association and incentive meeting planners from outside the state of Florida. The two-day trade show with pre-scheduled appointments also offers networking opportunities at specially arranged functions with a goal being a 1:1 ratio of planners to suppliers.

Co-op not permitted per Visit Florida. Industry participants must contact Visit Florida directly. Visit Florida will work with the TDC to arrange a "Keys" section once registration has been completed. Contact Visit Florida, (850) 488-5607.



**November 8-11**

**World Travel Market**

**London, England**

Registration: \$31,000.

Stacey Mitchell

Co-op participation available at \$1,200. per delegate in destination booth.

World Travel Market is the UK's largest annual travel trade show. This show will be held at the ExCel Exhibition Center located in East London. FLAUSA creates a Florida Pavilion for the state industry to exhibit their products and meet with travel agents, tour operators, and travel media

The UK market has become the cornerstone of the Florida Keys international marketplace. The Florida Keys will continue to show a strong presence in this marketplace to build on existing trade relationships as well as identifying emerging "niche" travel markets.

**November 10-12**

**Corporate Meeting and Incentive Sales Calls**

**Tampa Bay/Metro Area, FL**

Registration: N/A

Susanne Tortu

Cooperative participation will be made available for four delegates as an "add on" from Florida Encounter. Each appointment will consist of individual sales presentations in an informal format and will include food and beverage based on the time of the appointment. In lieu of a participation fee, food and beverage sponsorship opportunities will be required from all registered delegates. Please note that program will begin on Wednesday morning following the conclusion of Florida Encounter, and will encompass driving to the Tampa area. Participants will be responsible for booking their return transportation either from the Tampa or Orlando region.

**November 12-16**

**NTA National Tour Association**

**Toronto, Canada**

Registration: \$3,000.

Jutta Farrer

Co-op opportunities not available per NTA.

The National Tour Association is North America's premier packaged travel association. NTA represents more than 630 regional tour operators, large tour companies and destination management companies. The annual convention, featuring the Tour and Travel Exchange, consist of pre-scheduled appointments between the travel trade and suppliers. This is the only appointment event dedicated to the domestic tour operator market.

In conjunction with our attendance at the NTA appointment sessions, we will conduct two days of sales calls directed to travel agencies and corporate/incentive buyers in the area.

**November TBD**

**12th National Gay and Lesbian Consumer Show**

**New York, NY**

Registration: \$3,500.

Steve Smith

Co-op available at \$175. ; Limited to 12 delegates.

For the sixth year, the Florida Keys and Key West will participate in one of New York's most successful Gay and Lesbian consumer shows. Last year, 15,000 consumers and travel professionals attended. As a sponsor, our destination will gain more exposure prior to and during the show through direct mail promotions, posters discount coupons, etc.

**DECEMBER 2004**

**December 5-8**

**Meier's Weltreisen FAM Event**

**Orlando, FL**

Registration: \$2,000.

Jutta Farrer

Meier's Weltreisen is one of Germany's largest tour operators. The Florida Keys and Key West is invited to meet with up to 100 of their top selling travel agents and to make formal destination presentations to the delegation during their educational sessions.

**December 14**

**Holiday Showcase (Association Forum of Chicagoland) and Area Sales Calls**

**Chicago, IL**

Registration: \$1,500.

Susanne Tortu

Co-op participation available for 2 delegates at \$850. each. Co-op delegates must have current membership with the Association Forum of Chicagoland.

A sell-out show year after year, Holiday Showcase has become the premier Meetings Show in December. Well over 650 suppliers attend this show, attracting Chicagoland's Association and Corporate Executives, Meeting Planners and Incentive Houses, and Corporate Travel Managers.

Sales calls will be made to corporate, incentive and meeting planners in the greater Chicagoland metro region prior to attending this show.

**JANUARY 2005**

**January 7-9**

**Adventures in Travel Expo**

**Chicago, IL**

Registration: Covered by Dive Umbrella Susanne Tortu

Co-op participation available, maximum (4) delegates.

Adventures in Travel Expo is the world's premier event serving adventure, eco and outdoor tourism enthusiasts and professionals. National Geographic Traveler and Adventure magazines are the key media sponsors of this event, insuring high end media and travel professional exposure. The first day is limited to the travel trade, with the next two days open to consumer traffic.

**January 11-16**

**Vakantiebeurs**

**Utrecht, The Netherlands**

Registration: \$650. Sabine Chilton

The TDC will have representation at this tradeshow **via brochure distribution.**

Considered the largest travel and tourism event in The Netherlands, over 150,000 consumers and travel trade attended in January 2004. First day is limited to travel trade and media only with an apt based format.

The US. is the number one preferred long-haul destination for the Dutch market, capturing 32% of the long haul market share. The Dutch prefer warm and sunny destinations, and has a keen interest in outdoor activities, soft adventure and eco tourism.

**January 13-16**

**Reiseliv**

**Lillestrom, Norway**

Registration: \$750. Sabine Chilton

The TDC will have representation at this tradeshow **via brochure distribution.** Reiseliv is Scandinavia's premier Travel and Tourism show. This is the most important forum and market place for the Norwegian and international travel industry in Scandinavia. The show is open to both travel trade and consumers. Last year's attendance topped 40,000 visitors, and the request for information on The Florida Keys and Key West continues to grow. With a Scandinavian Sales Mission planned later in the year insuring direct exposure to the travel trade, the destination will participate in the brochure distribution available to Visit Florida partners.

**January 14-16**

**Adventures in Travel Expo**

**New York City, NY**

Registration: \$4,700.

Stacey Mitchell/Staff

Adventures in Travel Expo is the world's premier event serving adventure, eco and outdoor tourism enthusiasts and professionals. National Geographic Traveler and Adventure magazines are the key media sponsors of this event, insuring high end media and travel professional exposure. The first day is limited to the travel trade, with the next two days open to consumer traffic.

**January 25-27**

**Florida Huddle**

**Daytona Beach, FL**

Registration: \$2,300.

Stacey Mitchell

Co-op participation not available at this time. Keys exhibitors should contact International Productions at (407) 856-4747 directly. TDC will coordinate a Florida Keys section if number of registrants from the destination warrants.

Huddle is a mini Pow Wow computerized appointment show. It is exclusively formatted to promote Florida product to the international FIT and group tour market. There are only 2 shows per year designated for the international market: Pow Wow and Huddle. Florida Huddle is not as cost prohibitive and will give you Florida-specific exposure.

**January 28-30**

**Adventures in Travel Expo**

**Washington, DC**

Registration: \$4,700.

Jutta Farrer/Staff

Adventures in Travel Expo is the world's premier event serving adventure, eco and outdoor tourism enthusiasts and professionals. National Geographic Traveler and Adventure magazines are the key media sponsors of this event, insuring high end media and travel professional exposure. The first day is limited to the travel trade, with the next two days open to consumer traffic.

**FEBRUARY 2005**

**February 12-15**

**BIT**

**Milan, Italy**

Registration: \$400.

Sabine Chilton

The TDC will participate via **brochure distribution** facilitated by Visit Florida. BIT is Italy's largest trade show, attracting over 40,000 attendees over a five-day period. With new daily non stop flights from Milan and Rome into Miami, the Italian market is rebounding, and the Florida Keys continues to receive requests for information and destination training from the Italian travel trade. The Commercial Service of the Visit USA Committee/Italy, in cooperation with the TDC, will pre-schedule appointments for the destination during the first two days of the show.

**February 26-27**

**12<sup>th</sup> National Gay and Lesbian Consumer Show**

**New York City, NY**

Registration: \$5,000.

Steve Smith

Co-op participation available at \$250. per delegate, limited to 12 delegates.

This show typically draws over 20,000 consumers and travel professionals. Major corporate sponsors include American Airlines, US Postal Service, IBM, Continental Airlines and United Airlines. More and more destinations are exhibiting at this show in order to compete for the gay tourism dollar.

Our presence has grown during the 11 years we have participated, and we encourage continued industry participation. Our destination continues to be the most popular exhibitor at the show.

**February, TBD**

**"Own a City Campaign"**

**Raleigh/Durham**

**Raleigh-Durham, NC**

Registration: N/A

Staff

As part of our "own a city" campaign strategy, the TDC sales staff will be "blitzing" the Raleigh/Durham and Research Triangle Park Region metro regions with sales calls and presentations made to travel professionals in both the leisure and corporate markets. These areas directly benefit from USAir and American Airlines service routes to South Florida and the Keys and are regions of emerging growth for our destination

**MARCH 2005**

**March 5**

**Palm Beach County Pridefest 2005**

**Palm Beach, FL**

Registration: \$300. Steve Smith

Brochure Distribution available at \$50 per partner.

Palm Beach Pride offers a low cost way of exposing the destination to high end consumers who tend to travel during the traditional shoulder and off season months.

**March 9**

**Visit USA Brussels**

**Brussels, Belgium**

Registration: \$900. Stacey Mitchell

This is the largest travel tradeshow offered in Brussels, targeting the travel trade from the Benelux countries. The top tour operators and travel agents gather for a day of workshops and tabletop presentations from various destinations.

**March 11-15**

**International Tourismus Borse (ITB)**

**Berlin, Germany**

Registration: \$25,000. J. Farrer/S. Mitchell

Co-op opportunities available at \$950. per delegate. The Florida Keys and Key West will exhibit within the FLA USA section. We will continue to contract for a consumer and trade booth.

This trade fair is known as the world's largest tourism showcase. ITB continues to be the "Must Attend" tradeshow for any one who is committed to the International Marketplace. The most recent Visitor Profile Survey listed Germany as the number two ranked origin of international visitors, therefore making ITB one of the most important trade events of the year. Our German market sales and public relations office will coordinate appointments during the trade and media days, targeting both niche market and mainstream trade.

**March 17**

**Destination Showcase with IACVB**

**Washington, DC**

Registration: \$3,100.

Susanne Tortu

Cooperative participation is available at \$850 for (3) delegates.

Destination Showcase is one of the most efficient and effective ways to reach and influence professionals who plan meetings and are responsible for site selection. Each year's event boasts more than a 4:1 ratio of meeting planners to exhibitors. IACVB has established the ability to draw qualified meeting planners and buyers to their trade events in key feeder markets.

**March 18-20**

**Beneath the Sea Dive Show**

**Secaucus, NJ**

Registration: Covered by Dive Umbrella

Susanne Tortu

Co-op participation available to the Dive Industry at \$250. per Dive Operator.

Maximum number of participants will be six, and final participation will dictate booth space. This is a well-attended consumer show, catering to the Dive Consumer in the lucrative Northeast corridor. We received great exposure at the 2004 show and expect to increase exhibit space this year to 400 square feet.

**March 27**

**Palm Beach County Pridefest 2005**

**Palm Beach, FL**

Registration: \$300.

Steve Smith

Industry may participate in brochure distribution at \$50.

Pride Festivals provide a low cost venue to reach thousands of consumers. Typically the Keys are among a handful of destinations using this economical venue. South Florida is our most important summer leisure market and Palm Beach County is within a four hour drive to our destination.

**March, TBD**

**Washington, DC / Regional Sales Calls**

**Washington, DC**

Registration: N/A

SusanneTortu

Cooperative participation will be made available for four (3) delegates.

The TDC will be conducting a sales mission to the Mid-Atlantic metro area focusing on meeting planners, group travel planners, incentive houses and corporate conglomerates.

Each appointment will consist of individual sales presentations in an informal format and will include food and beverage based on the time of the appointment. In lieu of a participation fee, food and beverage sponsorship opportunities will be required from all registered delegates. The TDC will be responsible for the coordination of each appointment and ground transportation to all appointments in the area.

**APRIL 2005**

**April, TBD**

**Raleigh Southern Women's Show**

**Raleigh, North Carolina**

Registration: \$1,400.

Jutta Farrer

Women play a major decisive role in planning travel and leisure destinations for the family. Last year's show survey ranked "Travel" the highest interest amongst attendees at 47%. In addition to the exposition, this event offers destination seminars for consumers to learn more about exhibiting companies.

**April, TBD**

**Destination Showcase with IACVB**

**New York City, NYC**

Registration: \$3,100.

Susanne Tortu

Cooperative participation is available at \$850 for (3) delegates.

Destination Showcase is one of the most efficient and effective ways to reach and influence professionals who plan meetings and are responsible for site selection. Each year's event boasts more than a 4:1 ratio of meeting planners to exhibitors. IACVB has established the ability to draw qualified meeting planners and buyers to their trade events in key feeder markets.



**April, TBD**

**Corporate Meeting and Incentive Sales Calls**

**New York Metro Region**

Registration: N/A

Susanne Tortu

Cooperative participation will be made available for four (3) delegates.

The TDC will be conducting a sales mission to the New York Metro region focusing on meeting planners, group travel planners, incentive houses and corporate conglomerates.

Each appointment will consist of individual sales presentations in an informal format and will include food and beverage based on the time of the appointment. In lieu of a participation fee, food and beverage sponsorship opportunities will be required from all registered delegates. The TDC will be responsible for the coordination of each appointment and ground transportation to all appointments in the area.

**April TBD**

**North by Northwest**

**Portland, OR**

Registration: \$1,200.

Stacey Mitchell

This is the only travel trade appointment show solely devoted to the Japanese market. There is a 1:1 ratio of suppliers to Japanese tour operators for two days of business sessions, slide presentations and educational networking sessions geared towards building new brochure programs to our destination.

**MAY 2005**

**May 2**

**Pridefest Philadelphia**

**Philadelphia, PA**

Registration: \$500.

Steve Smith

Brochure Distribution is available at \$50. per partner.

Philadelphia hosts the nations largest gay and lesbian festival. This consumer event draws thousands from the metro Philadelphia region, which is very accessible to the Keys via American Airlines and US Airways.

**May 3-7**

**TIA's POW WOW  
New York, NY**

Registration: \$8,500.

Sabine Chilton/Stacey Mitchell

Co-op opportunities available, limited to 4 delegates. Registration will open in early fall. Companies interested in pursuing the international market and joining TIA should call (202) 408-8422. This show sells out every year, so early registration is critical for exhibiting.

Pow Wow is the premier marketplace for over 1500 inbound tour and travel promoters. Participation in this show is key in pursuing the wholesale market, with participants hailing from over 70 nations. This is an appointment show with trade show booths and many networking opportunities.

As in years past, the Florida Keys and Key West will conduct a lottery drawing in the fall for booth participation.

**May 4**

**Golden Opportunities with Meeting Spots**

**Tallahassee, FL**

Registration: \$1,000.

Susanne Tortu

Co-op opportunities available at \$250. per delegate; limited to 9 delegates. This evening show focuses on the extensive Florida Association market, which is critical to the Florida Keys summer business base. The Florida Association market is one that requires gradual relationship building and entails consistent sales visitation and networking. All major Florida CVB's attend and the show guarantees seeing no less than 200 planners.

**May, TBD**

**Sales Mission to Norway, Sweden and Denmark**

**Oslo, Stockholm and Copenhagen**

Budget: \$5,000.

SabineChilton/Stacey Mitchell

Co-op participation available at no charge.

The Florida Keys and Key West will be targeting tour operators for destination training and formal presentations. As most Scandinavians book their holidays via a Tour Operator or major Travel Agent, the importance of reaching the travel trade is crucial in developing this emerging market. Leisure pursuits are geared towards sunny and warm climates, and our destination is an obvious attraction for this market segment. The Mission would comprise of sales calls, tour operator reservation staff training and travel agent training events.

**May 12-15**

**IGLTA Annual Convention**

**Koln, Germany**

Registration: \$700.

Steve Smith

Brochure Distribution available for \$50. Delegates must be registered convention attendees.

This annual event draws over 300 travel professionals. The event continues to grow as the IGLTA membership now exceeds 1,200. Competition for gay tourism dollars is increasing with new destinations vying for this lucrative travel segment.

**JUNE 2005**

**June 11-12**

**Capital Pride**

**Washington, DC**

Registration: \$300.

Steve Smith

Brochure Distribution available at \$50 per delegate.

Washington DC has a very large Gay and Lesbian community, many working in the government and association sectors. Included in this geographical region are residents of affluent neighborhoods in both Maryland and Virginia.

**June 15-16**

**HSMAl's Affordable Meetings West**

**San Jose, CA**

Registration: \$1,100.

Susanne Tortu

Co-op participation available at \$850. per delegate with a maximum 4 delegates.

Continuing efforts in developing the California market in the meetings and incentives market, the TDC will use the auspices of HSMAl and their past proven success with both their National and Mid-America shows to promote the meetings venues of the Florida Keys.

This year the show will move to southern California. This region of the state is strong on Aerospace and defense industries. The current climate with Homeland Security budgets and defense spending will be beneficial to this area because of its existing defense contracting infrastructure.

**June TBD**

**Atlanta Pride**

**Atlanta, GA**

Registration: \$800.

Steve Smith

Brochure distribution available at \$50. per participant.

This event draws thousands of consumers from the Atlanta metro region. This Pride event is well attended and booth participation will be limited. Past participation shows a continued interest in the destination making this a strong venue for our marketing efforts.

**June TBD**

**Austin Bridal Extravaganza**

**Austin, TX**

Registration: \$1,150.

Jutta Farrer

These weekend consumer shows focus on the lucrative bridal, honeymoon and romance market in the high end Austin region.

Sales calls to the general travel trade to include Virtuoso, American Express Platinum Travel Services in addition to tour operators located within the Austin metropolitan region will be conducted either before or after this consumer event.

**AUGUST 2005**

**August, TBD**

**North Halsted Street Days**

**Chicago, IL**

Registration: \$1,100.

Steve Smith

Co-op participation available at \$175 for four (4) delegates.

This event is in it's 13th year, and has been a sell out the previous eight. The event is the largest two-day Gay and Lesbian festival, and attracts over 250,000 attendees. The destination delegation works closely with American Airlines/American Eagle, which is one of the corporate sponsors of the event.

**August, TBD**

**CMITS (Canadian Meeting and Incentive Travel Show)**

**Toronto, Ontario**

Registration: \$1,500. Sabine Chilton/Susanne Tortu

Co-operative participation available at \$550 per delegate.

Canadians are making tracks to your neighborhood in increasing numbers. According to the latest See North America reports, Canadian travel to the U.S. increased over 29% in 2003, and is expected to grow even more in 2004/2005. This is due to the Canadian GDP growth, record unemployment rates and increased consumer confidence.

CMITS attracts the travel industry from all over Canada, and targets corporate, meeting and incentive planners along with members of the general travel trade.

In addition to our participation in this event, sales calls will be conducted in Toronto and Montreal focusing on corporate and travel trade business

**SEPTEMBER 2005**

**September 27-29**

**Incentive Travel and Meeting Exhibition (IT&ME)**

**Chicago, IL**

Registration: \$5,000. Susanne Tortu

Co-op participation available at \$850. per delegate. Maximum number of delegates limited to 10 participants. Cooperative participation will be solicited beginning November of 2004 for the ITME 2005 show.

The Annual Incentive Travel and Meeting Exhibition takes place in conjunction with the National Premium Incentive Show, and attracts nearly 20,000 travel buyers. Surveys indicate that 75% of the audience attend no other incentive show and over 54% of the attendees are the final decision-makers.

Visit Florida coordinates a "Florida Section" in a high profile area of the convention center, of which we traditionally register for 400 square feet of booth space. Visit Florida requires from each cooperative participant an individual "Florida Section Fee" from secondary partners at \$100. per delegate. For additional information, contact Visit Florida, 850-488-5607.

**September TBD  
La Cumbre  
Miami, FL**

Registration:         \$2,500.

Sabine Chilton

La Cumbre is the premier travel industry conference for the sales and promotion of travel to the U.S. from Latin America and the Caribbean. The event features senior executives of major wholesalers, tour operators, retail travel agencies and U.S. receptive operators to meet during a computerized appointment show. Attending La Cumbre is the most cost-effective method of reaching potential customers from Latin America.

**Ongoing Sales Efforts**

**Destination Days**

**Sales Staff**

Presentations and destination training will be conducted to travel trade professionals in the South Florida area. These travel trade professionals include Certified Vacations/Delta Dream Vacations, Travel Leaders, AAA Auto Club South and Virtuoso Travel Agencies.

**Bridal Shows**

**Sales Staff**

In an effort to promote the destination as a viable wedding and honeymoon destination, the Florida Keys and Key West will be participating in bridal/honeymoon promotional events in key feeder markets. Co-operative participation will be made available whenever possible.

**Electronic Marketing**

**Sales Staff**

In an effort to increase our exposure to all market segments, sales staff will develop electronic marketing promotions utilizing our current database. These efforts will include electronic postcards, flash programs, e-newsletters as well as video. These efforts can be utilized as pre-promotional event notices, follow up tool to trade show participation as well as updates and periodic communications to established clientele base.

**CELLET TRAVEL SERVICES, LTD.**